



VERIS RFP Project Site Visit and Interview Notes

Contents

General Information	3
Absentee	3
Hopper	3
Online issues	3
Central absentee precinct.....	4
Spoiled ballots.....	4
Help with capturing supporting information	4
FPCAs.....	4
Document scanning	5
Disk capacity	5
Retention schedule	5
Multiple categories of scanning.....	5
Save all	5
Batch scanning	5
Scanned document adjustments	6
Scanned document relocations	6
Hopper processing	6
Save and next.....	6
Scanned documents hopper	6
Incomplete Hopper	7
Candidate management.....	7
Candidates as first-class entities.....	7
Redistricting	7
Data issues	7
Voter Registration.....	7
Canceling a voter record	7



VERIS RFP Project Site Visit and Interview Notes

Special characters	8
Add voter screen.....	8
Previous statuses	8
Clear signature button	8
Protected status.....	8
Citizen Portal.....	9
Voter feedback.....	9
Election management.....	9
Forms Warehouse.....	9
Security	9
Multi-factor authentication	9
Communication of issues	10
Liaisons.....	10
GIS	10
Overlapping borders	10
Data sources.....	10
Incorrect data.....	10
Reports and correspondences	10
Unnecessary reports	10
Customizing correspondences.....	10
Useful features.....	10
Customizable home screen.....	10
Research window	10
Home page.....	11
Pollworker management	11
Petitions	11



VERIS RFP Project Site Visit and Interview Notes

General Information

Topic: Absentee

Absentee

Absentees are either mailed in, come through the hopper or arrive in person. The Hopper is the most common place for them to arrive. In person is second. They get into Hopper from state's website.

Absentee requests come through in three ways:

- Hopper
- Mail
 - 701 form
 - 703 form
 - FPCA
 - FWAB
- In-person

Hopper

In order for an application to show up in the hopper, the voter looks up their record online through the Citizen Portal. If the voter needs to update their voter registration information, they change the voter registration form (the registration request ends up as “pending” in the OAB Hopper). If the voter has no updates to their record, they select the option to apply for an absentee ballot.

Sometimes, an existing voter fails to lookup their voter record and to ensure their residence address is correct. They separately request an absentee ballot at a new residence address. If the voter's new residence is in the locality, the GRs update the voter registration record and process the application. If the voter's new residence is in another locality, the application request can be immediately transferred, and, if the locality has access to the official voter registration record, the new locality can look up the voter, transfer the record into their locality, and process the application. If the locality doesn't have access to the official voter record (i.e. voter is in a non-scanning locality), the locality has to wait for the physical form to arrive or ask the original locality to scan in the record.

Online issues

For non-FPCA, single-election ballot request applications, the form has to be valid for the calendar year, instead of applying for elections in the following year (or in the future). Invalid applications are denied.

The 703—annual medical absentee request form—requires a physician's signature for the first request. Afterwards, the voter can renew the application online. VERIS doesn't record whether a voter had a



VERIS RFP Project Site Visit and Interview Notes

valid 703 in the past, so voters can submit new 703s online, which have never had a doctor's signature, that get denied.

The DMV doesn't record military information when processing voter registrations, so the registration updates come through as empty. For existing registrations, some other GRs have mentioned that the DMV apps strip the military status. The GRs say the DMV is aware of the issue and is planning to fix and add the military question in the next month.

Central absentee precinct

A CAP is a location to which all absentee ballots are sent for processing.

Spoiled ballots

If voters ask for a new ballot—because of damage or a mistake—the voter is reissued a new ballot and that is captured in VERIS.

Help with capturing supporting information

VERIS doesn't prompt for supporting information when capturing the FPCAs of overseas voters. The FPCA needs to have reasons they are overseas as it determines the type of ballot. If the voter has moved away and is no longer planning to return, the voter is only eligible to vote a federal-only ballot. If the voter is overseas for business and intending to return, they can vote a full ballot.

FPCAs

They would like to have messaging to alert the voter that it is too early to apply for the election.

Voters using an FPCA can apply earlier than other voters. If they are not registered and apply to vote and apply for Absentee, they show up on OAB with zeros for the SSN.

There should be a way to mark in VERIS that there have been multiple registrations coming through for particular absentee voters.

The GRs would like the FPCAs to be placed in either the OVR or OAB hopper but not both. An even better solution would be for FPCAs to have their own hopper as this limits the confusion over these applications, the GRs said. They shared that often in GR offices different people are responsible for processing OVRs and OABs. Having less crossover speeds up the process.



VERIS RFP Project Site Visit and Interview Notes

Document scanning

Disk capacity

The system was slow and errors out because it exceeded disk space. The upload process requires the file to be under 5MB.

Retention schedule

They still have no retention schedule for their scanning. Even though ELECT said that once historical scanning was done those electronic files count as the real records. Technically they should be able to destroy the original paper records, but they have not as they want very specific instructions/OKs from ELECT. They are all keeping every last document.

Multiple categories of scanning

There should be two kinds of document scanning: current and historical. For each document scanned in, there should be fields for the date of the document, a description, and a setting for whether the signature should be captured. The description field exists, but can only be set with a batch. The localities currently “trick” VERIS to upload historical documents by marking them as “other” to avoid the mandatory signature capture that comes with a voter registration capture and, after its been scanned, switch the document type to “voter registration.”

They want to be able to add the original date of the document when it is being scanned and uploaded.

Their work around is to avoid cropping signatures. They do not want to capture a historical signature. They only want the current one. They want the option to not capture signature if historical. There is a column that says description. Unless the user is in a batch process, there is no column for descriptions. An individual application uploaded does not allow for a description, which is counter intuitive.

Save all

During the batch upload process, even if the forms being uploaded have no requirements for capturing signatures, the process requires each document to be saved individually. They want a “save all” button in batch upload mode. Otherwise they have to hit save for each document in the batch.

Batch scanning

They want the ability to add a description when scanning a document to an individual record. When batch scanning you can add a batch name to better organize the electronic records, adding this ability for individual scans would help with record keeping.



VERIS RFP Project

Site Visit and Interview Notes

Scanned document adjustments

For documents scanned into VERIS, the GRs feel there should be a feature to adjust the contrast or brightness of an image so that it can be viewed more easily. Sometimes a scanned document has writing that is too light or too dark and the information on the application is difficult or impossible to read. Adding this feature means that badly scanned documents can still be viewed in their entirety.

Scanned document relocations

The GRs would like the ability to relocate a scanned document to a different record if the document is found to be there in error, similar to the merge process. Due to human error, sometimes a document will be associated to the wrong record. Being able to move these documents around in VERIS when a mistake is found would help the GRs. Currently they would either have to go back to find the original document and rescan it to the correct record or print out the scanned document and rescan it to the correct record.

The GRs would also like the capability to associate documents to other locality's records – and add comments - if the voter has a previous history in their locality. Additionally, for the localities going back and forth and scanning their delete filing, this would help speed up the process for all of the transferred out alpha cards that need to be individually scanned. They said they could batch them instead of scanning them individually which is tedious.

Hopper processing

Save and next

For every record in the hopper, when the GRs are finished processing a record, the hopper should present the next record in the hopper until the hopper is empty. They want "Save & Next" capability. They do not want to go back to the Home screen, re-enter the name and start over. So much wasted times and clicks.

Scanned documents hopper

In the scanned documents hopper, VERIS should default to only view the documents added to the hopper by the current user. Currently this hopper is sorted alphabetically based on the VERIS user name. You then have to go to the drop down menu at the top to display your documents. They have found it a very rare situation for a user to associate a different user's documents. It speeds up associating if it defaults to that user's documents but still allows you to associate another user's documents if required.



VERIS RFP Project Site Visit and Interview Notes

Incomplete hopper

During the close of books, localities feel they should have the ability to enter and process applications that are temporarily on-hold. The day after an election these applications can be automatically processed by the system much like how the ADRMs are handled. The GRs want the ability to view all of the on-hold applications so they can answer questions from the public. While they currently have the incomplete hopper to handle this issue, the incomplete hopper still requires that a registrar hit “process” and “approve” in order to remove an applicant from the hopper. Adding a new hopper just for close of books that automatically processes after an election would be a great help to lessen the work load after an election.

Candidate management

Candidates as first-class entities

There was some debate about whether candidates should be more fully-featured entities within VERIS that would allow the GRs scan documents or manage correspondence. Some were concerned about the work involved in scanning the candidate documents into VERIS, while others thought that the convenience having documents in VERIS would save time in office administrative tasks like search for old files.

Redistricting

Data issues

Some GRs have to add new streets in all caps to get addresses to match. When standardizing streets, the USPS sometimes misspells the street names according to the county planning department.

Voter registration

Remove “previous” address type designation for addresses under “Voter Overview” – “Address History” as currently this unnecessarily confuses the table on the screen. All the table needs is each address in order (current on top) and the start and end dates for each address.

Canceling a voter record

The GRs cancel a lot of voters for the “out of state” reason code. They separately make envelopes for the out of state addresses so that the letter will get to the voter and not go to their old Virginia address. While canceling a voter record, there should be an option to add a mailing address for the cancellation letter that goes out. Implementing this change will make the process faster.



VERIS RFP Project

Site Visit and Interview Notes

Special characters

There's not much consistency on how special characters are entered or removed. If it's on a paper form, the characters are removed and replaced with Latin equivalents. If the records come in the hopsers, sometimes they're removed and replaced with Latin equivalents. The GRs believe the external data sources are left as-is and are unsure if removing the special characters causes matching issues.

Add voter screen

The "add voter" screen when processing OVRs should show how a voter answered all questions on the application. For all of the localities that don't print OVRs any more (which is a lot, they said), it is important to include this. A new voter can be added even if they answered "yes, I've been convicted of a felony" and "no, my rights have not been restored" which is normally a cause for denial. They've been looking at each new application before processing to work around this but it would help to see everything on the add voter screen.

The GRs would like a "print" button added to the add voter screen when processing OVRs. Currently the OVR can be printed on the main hopper page and on the next screen where their old record and new application can be seen to determine whether they can be matched. The GRs said that many times they need to print the application after they get past these two screens. So instead of having to go to the OVR hopper search to print the document, they can print it at any time during the OVR process.

Previous statuses

Previous statuses like "Military" or "Overseas" should not be auto-filled by VERIS. A voter whose current record shows a military status can reregister and check "no" or leave the box blank for "military" but VERIS will automatically check "military" box on the new application. This would mitigate confusion while processing about whether to keep the previous status or change it.

Clear signature button

They want to remove the "clear signature" button on the screens where documents are uploaded. They feel this is unnecessary because if you make a mistake capturing a signature, you can just capture a signature again to replace the one you just did.

Protected status

The GRs feel that voters who apply for protected status online or at the DMV should not be allowed to continue / submit unless they provide a PO Box. Currently the GRs reach out to voters to get a PO Box and most times these voters do not want to be protected, they said. They suggested that perhaps DMV also needs to provide more information about what protected status means before the voter is asked any questions. They shared that they receive so many applications from the OVR hopper where the



VERIS RFP Project Site Visit and Interview Notes

voter lists a protected status without a PO Box. Forcing the voter to provide a PO Box removes the hassle of trying to contact the voter to get the missing information.

Citizen Portal

Voter feedback

Only complaints are that the site is down. The only negative feedback they get on the citizen portal is “Oh, it’s down!” Otherwise they hear nothing about it.

Election management

Forms Warehouse

“Let’s guess and see if we can find the form that we need.”

This is where ELECT stores all of the forms. Only ELECT can post forms. However, all localities can download forms.

Table of contents in the Forms Warehouse is confusing. There are a lot of categories, but should be narrowed down more. Unclear if the form needed could be under multiple headings (e.g. Election Management for the Voter ID forms, but they’re under Policy and Guidance > Photo ID, which is counter-intuitive since they’re required on election day).

They used to have an ELECT administered SharePoint so the localities and ELECT could share back and forth with each other. ELECT stopped that as they said there were a lot of out of date forms. So they now use the VRAV website with a login. They send documents they’d like to share to the VRAV website administrator who posts the docs. The GRs also have a Google Drive account that hosts other information.

Security

Multi-factor authentication

2FA is painful to them as they need to use their own phones. They do not like that. There are ID snags. Some do not use phones for codes. They want ELECT to furnish phones and fobs.



VERIS RFP Project Site Visit and Interview Notes

Communication of issues

Liaisons

Some GRs find that some of the liaisons lack an understanding of their election administration issues.

GIS

Overlapping borders

Some counties that have access to GIS show overlapping borders.

Data sources

Incorrect data

Bureau of Vital Statistics (BVS) marked a person as dead when they weren't.

Reports and correspondences

Unnecessary reports

The number and content in the reports is confusing. They want to be able to request certain reports but not be kicked out of VERIS.

Customizing correspondences

Some GRs would like to customize the correspondences to personalize them (e.g. in small localities they may want to personalize the death notices). Other GRs think the correspondences are fine, as-is.

They want ability to create reports regarding whether documents are scanned for each voter.

Useful features

Customizable home screen

Not all understand how to use. May not be turned on anymore even if the link is there.

Research window

They want to avoid “backing out” of screens or processing. They want a research window or multiple sessions. They want the ability to open multiple screens or monitors. They want the ability to always be



VERIS RFP Project Site Visit and Interview Notes

moving forward. The GRs feel that a “master” screen where the user does their work and makes changes, and a screen purely for research where changes to the database cannot be made would be the best approach.

Home page

On the VERIS home page each dark blue bar labeled “links”, “general info”, “hopper” et cetera has a tiny light blue arrow that allows the user to minimize each section. The color of the arrow needs to be changed in their opinion and be white instead of blue.

Pollworker management

At the beginning, VERIS had a pollworker management function. One of the GRs – the smaller locality – used it. However, ELECT took it away. It only worked for placing pollworkers. They could not pay pollworkers with it. The one locality had to hand-write payroll and give to accounting. Now they use Excel for paying pollworkers. They would like to see all of that integrated into VERIS. Another locality tried to do this in Access but it produced too much paper so they also moved over to Excel.

Petitions

They want easy processing for residents on same street/area.